

SENIORS' HOUSING REPORT

Atlantic

CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2012

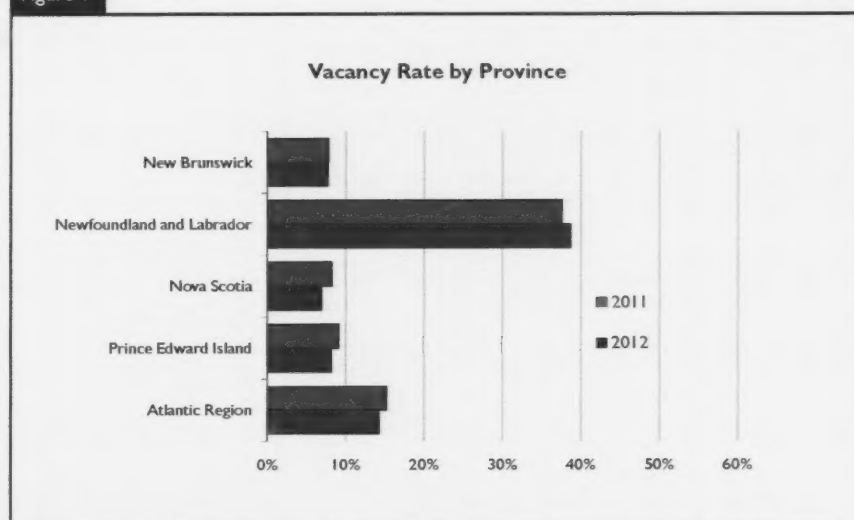
Highlights

- The overall vacancy rate for standard spaces in retirement homes in Atlantic Canada in the spring of 2012 was 14.3 per cent compared to 15.2 per cent in 2011.
- The three maritime provinces recorded lower vacancy rates in 2012 compared to 2011 ranging from 6.9 to 8.2 per cent. The vacancy rate in Newfoundland and Labrador remained higher than the rest of the region in 2012 due to a higher concentration of non-standard spaces in the surveyed universe.
- The overall average rent for a standard space in Atlantic Canada in 2012 was \$2,120, up from \$1,921 last year.

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Figure 1

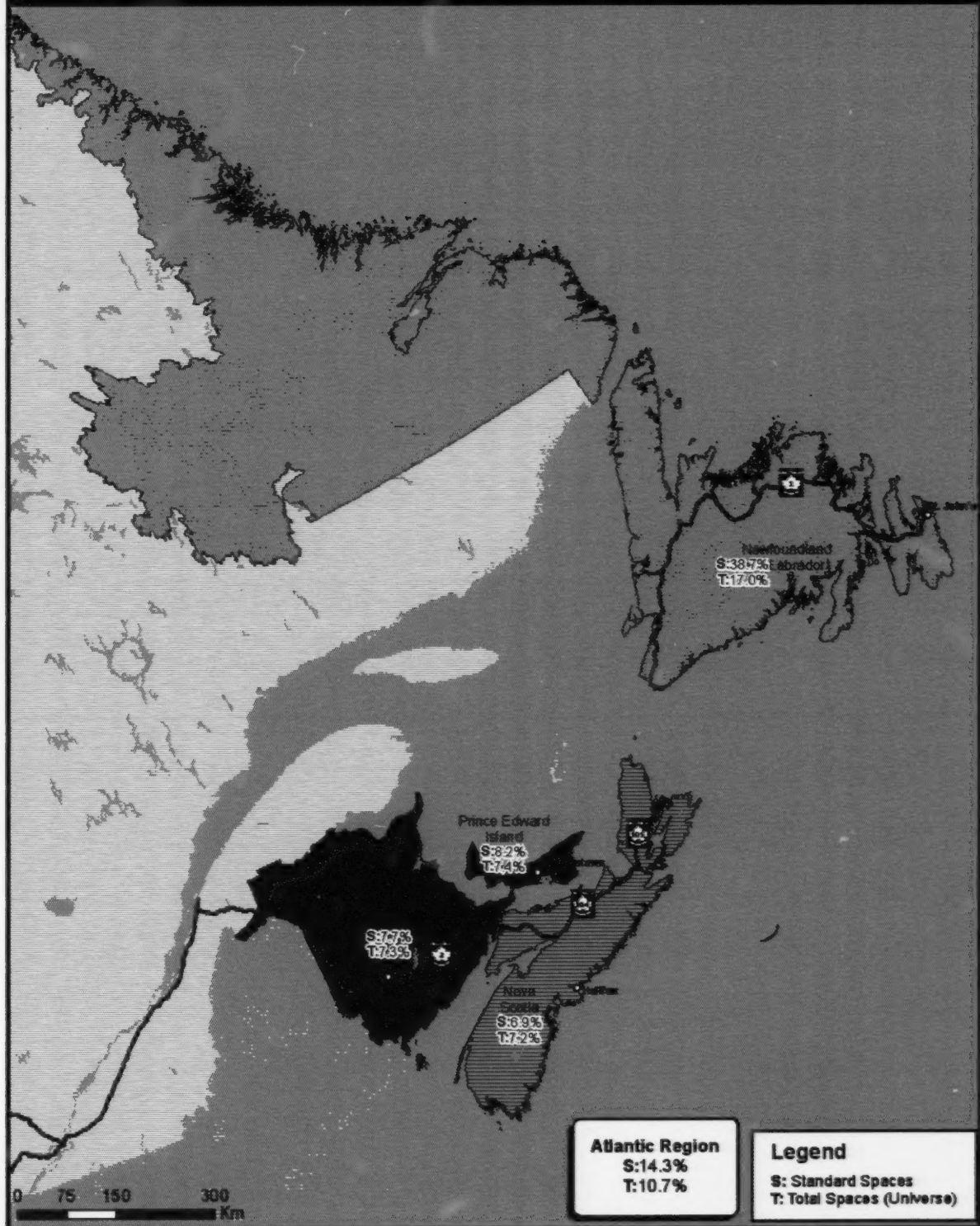


Source: CMHC

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Atlantic Vacancy Rate of Standard and Total (Universe) Spaces



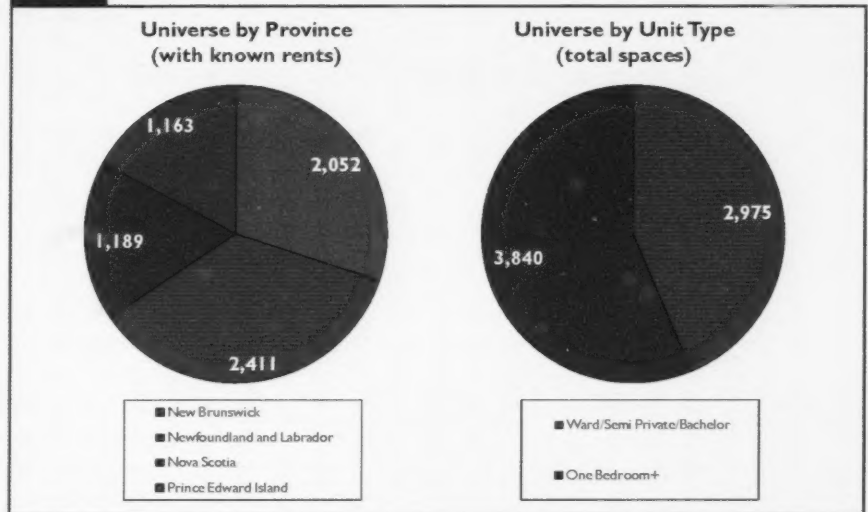
Introduction

The National Senior's Housing Survey is an annual survey conducted by Canada Mortgage and Housing Corporation. In Atlantic Canada, the 2012 survey included 144 structures that fit the established criteria and where management was willing to participate in the survey. These 144 structures contained 6,815 spaces.

There are three criteria for the survey. First, the majority of residents in the facility must be 65 years of age or older. Second, the residence must offer an on-site meal plan and thirdly, residences must contain at least five units. The survey, however, excluded facilities in which heavy care (heavy care is 1.5 hours of care or more per day) was mandatory. For this reason, nursing homes and long-term care facilities were not included in the survey.

A standard space is a space that is occupied by a resident who receives a standard level of care (as opposed to heavy care) of less than 1.5 hours per day. A non-standard space includes spaces that provide heavy care, spaces

Figure 2



Source: CMHC

offering respite (temporary/short-term) accommodation, or offer below market rents or subsidized rents.

Vacancy Rates Mixed in 2012

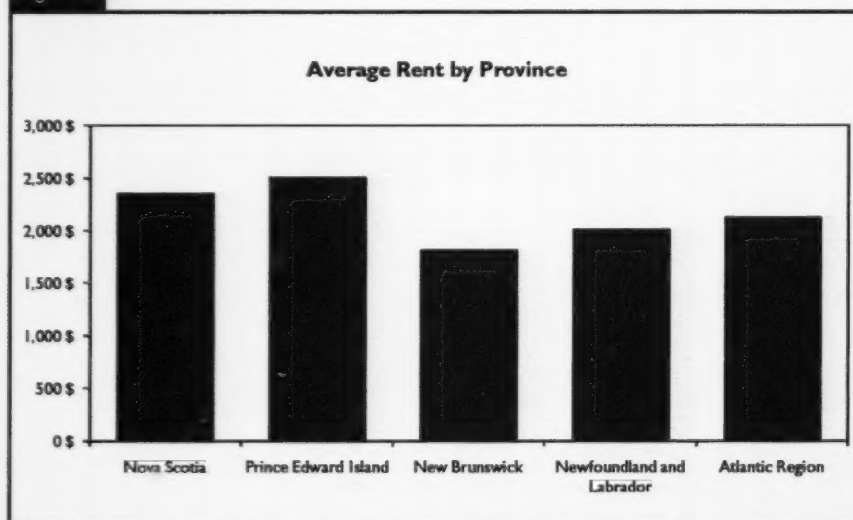
The overall vacancy rate for standard spaces in retirement homes in Atlantic Canada was 14.3 per cent in 2012,

down from last year's rate of 15.2 per cent. This compares to the overall national vacancy rate of 10.6 per cent in 2012, which was lower than the 10.7 per cent recorded in 2011.

The three maritime provinces, New Brunswick, Nova Scotia and Prince Edward Island, recorded lower vacancy rates in 2012 compared to 2011. In Nova Scotia, rates declined from 8.2 per cent in 2011 to 6.9 per cent in 2012. Prince Edward Island also posted a decline as the vacancy rate fell from 9.1 per cent to 8.2 per cent in 2012. In New Brunswick, rates recorded little change compared to 2011 at 7.7 per cent.

The vacancy rate in Newfoundland and Labrador increased slightly from 37.6 to 38.7 per cent in 2012. The rate in NL remained higher than the rest of the region in 2012 due to a higher concentration of non-standard spaces in the surveyed universe. The vast majority of the non-standard spaces in NL receive government subsidies and/or provide higher levels of care. It is believed that these features resulted in higher demand

Figure 3



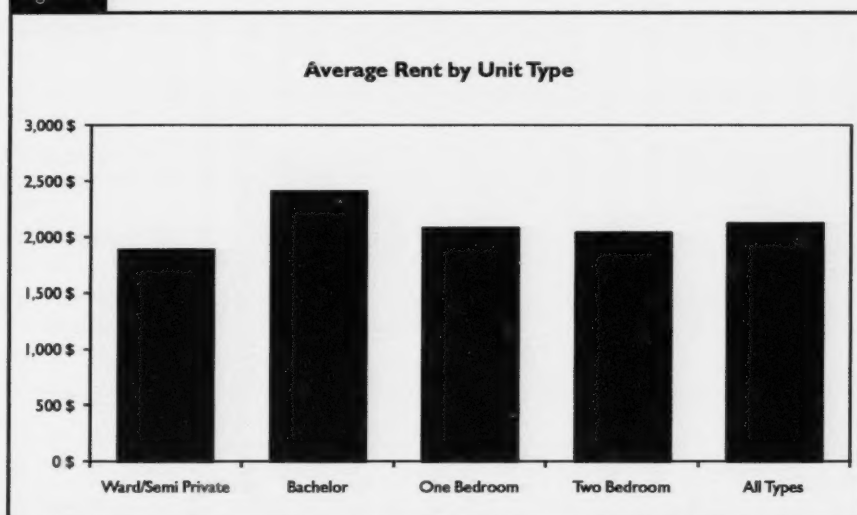
Source: CMHC

for these non-standard spaces. Lower levels of demand for the remaining standard spaces accounted for the relatively higher vacancy rate in this segment of the market and significantly impacted the overall vacancy rate for the province.

Vacancy rates by unit type in Atlantic Canada were also mixed in 2012. One-bedroom and ward/semi-private units recorded a decrease compared to 2011, while bachelor and two-bedroom units posted an increase in the vacancy rate.

The lowest vacancy rates in 2012 were reported for two-bedroom and bachelor-style units at 5.7 and eight per cent, respectively. Despite recording the lowest rates, vacancies for both unit types posted increases in 2012 compared to 2011 (the vacancy rate for two-bedroom units was 2.8 per cent in 2011 while bachelor units recorded a vacancy rate of 7.4 per cent last year). The vacancy rate for one-bedroom unit types declined from 9.8 per cent in 2011 to 8.3 per cent in 2012.

Figure 4

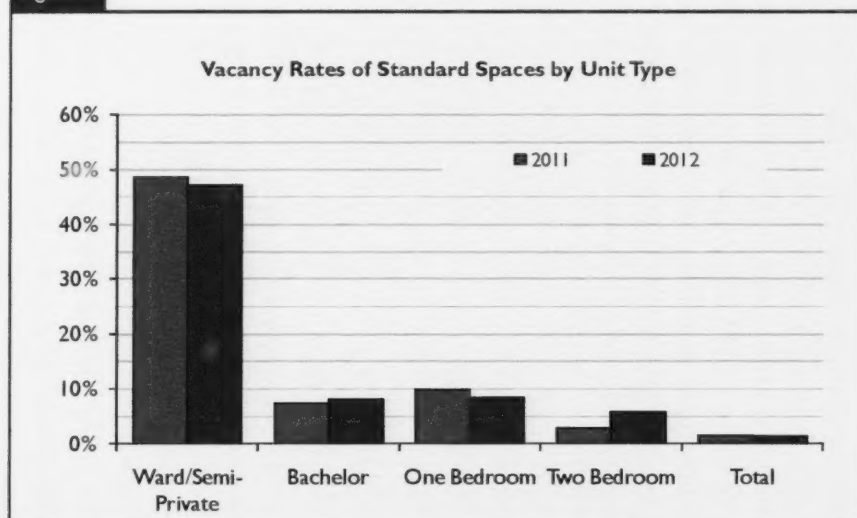


Source: CMHC

In ward and semi-private units, the vacancy rate declined slightly in 2012 to 47.2 per cent from 48.6 per cent last year. This relatively high vacancy rate was driven by an increase in vacancies in ward and semi-private units in Newfoundland and Labrador where vacancy rates climbed from 69.7 per cent in 2011 to 76.9 per cent this year. The share of non-standard spaces

of this unit type is significantly higher in NL than in the other three provinces. Given that a majority of these spaces are subsidized (which are not included in the survey), demand is more likely to be satisfied by these ward and semi-private units resulting in a higher vacancy rate in the remaining non-subsidized units (which are included in the survey).

Figure 5



Source: CMHC

New Brunswick Records the Most Standard Spaces

There were 144 structures surveyed in the 2012 Atlantic Seniors' Report survey. These 144 structures contained 6,815 spaces and housed 6,282 residents. Of the 6,815 spaces, 4,396 were standard spaces. New Brunswick reported the most standard spaces at 1,243 or 28 per cent of all standard spaces in Atlantic Canada. In Nova Scotia, 1,165 standard spaces were recorded representing a 27 per cent share of the total standard spaces. Newfoundland and Labrador and Prince Edward Island recorded percentage shares of 23 and 22 per cent, respectively.

Nearly 50 per cent of all standard spaces in Atlantic Canada rent for \$2,100 or more per month. One-third of standard spaces rent for less than \$1,850 per month, while the remaining 17 per cent of spaces rent for between \$1,850 to \$2,099 monthly.

The majority (83.9 per cent) of Atlantic Canadian structures offered three meals per day which were included in the reported rent. A 24-hour bell call service is offered at 76 per cent of structures while on-site medical services are offered at 41 per cent of structures surveyed. An onsite, registered nurse is available at 27 per cent of structures in Atlantic Canada.

In terms of amenities being included in rent, nearly 75 per cent of Atlantic Canadian structures offered transportation services while 53 per cent provided internet access. Exercise facilities were offered at 34 per cent of structures and access to a movie theatre was offered at 22 per cent.

Average Rents Increase in 2012

The average rent for a standard space in a retirement home in Atlantic Canada was \$2,120 in 2012 compared to \$1,921 last year. Each of the four provinces recorded an increase in average rents. The highest average rent was posted in Prince Edward Island at \$2,500 followed by Nova Scotia at \$2,355, Newfoundland and Labrador at \$2,005 and New Brunswick at \$1,810.

Each unit type recorded an increase in the average rent in 2012 with the highest rents recorded in bachelor units at \$2,411. The average rent of a one-bedroom unit increased to \$2,079 from \$1,918 last year while two-bedroom units posted an average

rent of \$2,039 in 2012 compared to \$1,694 in 2011.

TABLES INCLUDED IN THE ATLANTIC REGION SENIORS' HOUSING REPORT

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom		Total	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
Newfoundland and Labrador	69.7 a	76.9 a	**	--	13.3 a	10.1 a	--	**	37.6 a	38.7 a
Prince Edward Island	15.0 d	11.6 a	5.5 b	7.6 a	++	2.9 a	--	**	9.1 b	8.2 a
Nova Scotia	**	7.7 a	9.4 a	7.8 a	10.2 a	7.8 a	2.1 c	3.4 b	8.2 a	6.9 a
New Brunswick	**	**	8.2 a	8.7 b	8.3 a	8.2 b	3.7 a	1.9 a	7.8 a	7.7 a
Atlantic Region	48.6 a	47.2 a	7.4 a	8.0 a	9.8 a	8.3 a	2.8 b	5.7 a	15.2 a	14.3 a

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates (%) of Standard Spaces by Rent Range (\$) Atlantic Region

Province	Less than \$1,500		\$1,500 - \$1,999		\$2,000 - \$2,499		\$2,500 and more		Total where rents are known	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
Newfoundland and Labrador	**	**	51.0 a	57.8 a	2.2 a	1.1 a	13.2 d	5.5 c	37.6 a	37.5 a
Prince Edward Island	**	**	12.6 c	10.7 a	++	5.0 a	4.1 d	7.8 a	9.1 b	8.2 a
Nova Scotia	5.9 a	3.3 b	10.7 a	6.3 b	6.3 c	10.8 c	8.7 b	7.4 a	8.2 a	6.9 a
New Brunswick	5.0 a	4.3 a	3.6 d	++	4.9 c	8.6 c	18.5 a	12.7 c	7.8 a	7.9 a
Atlantic Region	5.9 a	4.7 a	31.0 a	32.6 a	4.0 b	5.8 b	11.6 a	9.5 a	15.2 a	13.9 a

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)**Atlantic Region**

Province	Total Number of Spaces	Overall Vacancy Rate		Number of Residences	Number of Residents	Estimated Population Aged 75+ ¹	Capture Rate ² (%)
		2011	2012				
Newfoundland and Labrador	2,411	18.5 a	17.0 a	50	2,002 a	34,000	5.9
Avalon Region	964	15.5 a	16.3 a	20	807 a		
Central & Eastern Region	845	19.2 a	17.1 a	18	701 b		
Labrador & Western Region	602	22.7 a	17.9 a	12	494 a		
Prince Edward Island	1,163	6.9 b	7.4 a	27	1,081 a	10,700	10.1
Kings & Prince County	498	11.4 c	8.8 a	12	458 a		
Queens	665	4.0 c	6.3 a	15	623 a		
Nova Scotia	1,189	8.7 a	7.2 a	34	1,207 a	70,800	1.7
Halifax	501	5.6 a	3.2 a	8	514 a		
Northern NS & Cape Breton	186	12.3 c	9.6 b	7	176 a		
Southern NS & Annapolis Valley	502	9.8 a	10.4 a	19	517 a		
New Brunswick	2,052	6.8 a	7.3 a	33	++	56,000	++
Northwest, Northeast & Central Region	555	8.7 a	12.6 a	13	501 a		
Southwest & Southeast Region	1,497	6.3 a	5.3 b	20	++		
Atlantic Region	6,815	11.5 a	10.7 a	144	6,282 b	171,500	3.7

¹ Source: Statistics Canada, Population Projections for Canada, Provinces and Territories, 2009-2036, Scenario 3.² The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

2.1 Universe of Total Spaces by Unit Type Atlantic Region

Province	Ward/Semi Private/Bachelor	One Bedroom +	Total
Newfoundland and Labrador	1,288	1,123	2,411
Prince Edward Island	1,038	125	1,163
Nova Scotia	290	899	1,189
New Brunswick	359	1,693	2,052
Atlantic Region	2,975	3,840	6,815

2.2 Universe by Unit Type Atlantic Region

Province	Ward/Semi Private/Bachelor	One Bedroom and Two Bedroom +	Total
Newfoundland and Labrador	1,288	1,123	2,411
Standard Spaces	424	604	1,028
Non-Standard Spaces	825	503	1,328
Unknown Spaces	39	16	55
Prince Edward Island	1,038	125	1,163
Standard Spaces	835	125	960
Non-Standard Spaces	203	—	203
Unknown Spaces	—	—	—
Nova Scotia	290	899	1,189
Standard Spaces	282	883	1,165
Non-Standard Spaces	8	7	15
Unknown Spaces	—	9	9
New Brunswick	359	1,693	2,052
Standard Spaces	208	1,035	1,243
Non-Standard Spaces	57	217	274
Unknown Spaces	94	441	535
Atlantic Region	2,975	3,840	6,815
Standard Spaces	1,749	2,647	4,396
Non-Standard Spaces	1,093	727	1,820
Unknown Spaces	133	466	599

2.3 Universe of Standard Spaces and Rent Range (\$) Atlantic Region

Province	Less than \$1,850	\$1,850 - \$2,099	\$2,100 +
	% of Total ¹	% of Total ¹	% of Total ¹
Newfoundland and Labrador	49.7 a	15.0 a	35.1 a
Prince Edward Island	**	**	46.0 a
Nova Scotia	27.1 a	10.7 a	62.2 a
New Brunswick	**	**	51.4 a
Atlantic Region	33.8 a	16.7 a	49.5 a

¹ % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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2.4 Proportion (%) of Structures where Select Services are Available¹
by Structure Size
Atlantic Region

Province	Meals				On-Site Medical Services	Registered Nurse onsite ²	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Newfoundland and Labrador	0.0 b	0.0 b	0.0 b	100.0 a	2.0 a	6.0 a	50.6 a	0.0 b
10 - 49	0.0 b	0.0 b	0.0 b	100.0 a	0.0 b	8.2 a	41.3 a	0.0 b
50 - 89	0.0 c	0.0 c	0.0 c	100.0 a	7.5 a	0.0 c	76.3 a	0.0 c
90 or more	—	—	—	—	—	—	—	—
Prince Edward Island	3.7 a	0.0 a	0.0 a	96.3 a	77.8 a	48.1 a	96.3 a	0.0 a
10 - 49	4.8 a	0.0 a	0.0 a	95.2 a	85.7 a	38.1 a	95.2 a	0.0 a
50 - 89	**	**	**	**	**	**	**	**
90 or more	**	**	**	**	**	**	**	**
Nova Scotia	0.0 b	17.6 a	21.3 d	61.0 a	67.6 a	43.4 a	88.2 a	8.8 a
10 - 49	0.0 b	12.0 a	++	79.0 a	64.0 a	++	84.0 a	8.0 a
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0 a	50.0 a	50.0 a	0.0 a	75.0 a	50.0 a	100.0 a	25.0 a
New Brunswick	++	++	++	++	++	++	85.6 a	++
10 - 49	10.4 c	0.0 c	0.0 c	89.6 a	++	++	89.6 a	5.2 b
50 - 89	++	++	++	++	++	++	++	++
90 or more	++	++	++	++	++	++	100.0 a	++
Atlantic Region	4.0 d	6.3 c	5.9 b	83.9 a	40.8 a	26.9 a	76.1 a	6.4 c
10 - 49	2.9 a	2.9 a	2.2 c	91.9 a	40.5 a	20.8 a	72.0 a	2.9 a
50 - 89	++	++	13.8 d	69.2 a	++	++	80.8 a	++
90 or more	++	++	++	++	++	++	100.0 a	++

¹ Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

² Registered Nurse on site means a RN, not a RPN or LPN.

The following letter codes are used to indicate the reliability of the estimates:

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2.5 Proportion (%) of Structures with Access to Selected Amenities¹
by Structure Size
Atlantic Region

Province	Transportation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Newfoundland and Labrador	84.0 a	0.0 b	0.0 b	0.0 b	8.0 a	18.3 a
10 - 49	86.4 a	0.0 b	0.0 b	0.0 b	5.5 a	22.2 a
50 - 89	77.5 a	0.0 c	0.0 c	0.0 c	15.0 a	7.5 a
90 or more	--	--	--	--	--	--
Prince Edward Island	85.2 a	0.0 a	0.0 a	11.1 a	37.0 a	59.3 a
10 - 49	90.5 a	0.0 a	0.0 a	9.5 a	23.8 a	47.6 a
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	**	**
Nova Scotia	61.8 a	0.0 b	++	++	41.9 a	78.7 a
10 - 49	52.0 a	0.0 b	++	++	29.0 d	71.0 a
50 - 89	**	**	**	**	**	**
90 or more	100.0 a	0.0 a	0.0 a	50.0 a	75.0 a	100.0 a
New Brunswick	++	6.1 a	++	78.8 a	++	++
10 - 49	++	0.0 c	0.0 c	++	++	++
50 - 89	++	++	++	86.7 a	++	++
90 or more	100.0 a	++	++	84.0 a	100.0 a	100.0 a
Atlantic Region	74.8 a	1.4 a	5.0 d	22.4 a	34.4 a	53.1 a
10 - 49	73.0 a	0.0 b	2.2 c	17.2 d	22.6 d	47.0 a
50 - 89	71.6 a	3.2 a	++	++	52.7 a	56.0 a
90 or more	100.0 a	8.9 c	++	73.3 a	91.1 a	100.0 a

¹ Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

The following letter codes are used to indicate the reliability of the estimates:

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** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

3.1 Average Rent (\$) of Standard Spaces by Unit Type**Atlantic Region**

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom		Total	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
Newfoundland and Labrador	1,708 a	1,786 a	**	--	2,134 a	2,154 a	--	**	1,967 a	2,005 a
Prince Edward Island	2,047 a	2,033 a	2,154 a	2,608 a	2,437 b	2,810 a	--	**	2,142 a	2,500 a
Nova Scotia	**	**	2,263 a	2,368 a	2,436 a	2,579 a	1,728 a	1,749 a	2,251 a	2,355 a
New Brunswick	**	**	1,918 a	2,061 a	1,491 a	1,727 a	1,639 a	2,089 b	1,593 a	1,810 a
Atlantic Region	1,841 a	1,893 a	2,108 a	2,411 a	1,918 a	2,079 a	1,694 a	2,039 a	1,921 a	2,120 a

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe. Non-profit residences must have at least one unit that is not subsidized.

To be eligible for inclusion in the 2012 survey results, a residence must:

- ✓ Have been in operation for at least one year, i.e., before January 2011
- ✓ Have at least 10 rental units (Quebec, Ontario, Prairies) or 5 rental units (Atlantic provinces and B.C.)
- ✓ Offer an on-site meal plan
- ✓ Not provide high levels of healthcare (defined as 1.5 hours or more of care per day) to all of their residents. Nursing homes and long-term care homes are examples of residences that were not included in the survey.
- ✓ Offer rental units. Life lease units and owner-occupied units are excluded from this survey.
- ✓ Have at least 50% of residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey, therefore, all seniors' residences in Canada meeting these criteria are included to be part of this survey.

Survey data were obtained through a combination of telephone interviews and fax and email responses. Information was obtained from the owner, manager, or residence administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data please click [here](#).

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include: one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard Space: A space where the resident does not receive high-level care (i.e., the resident receives less than 1.5 hours of care per day.) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy Care Space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples include Alzheimer, Dementia and mobility support residents.

Respite Space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or Subsidy Space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: Refers to the actual amount a resident pays per month for their accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture Rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement

The Seniors' Housing Survey could not have been conducted without the cooperation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality

All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

CMHC—HOME TO CANADIANS

Canada Mortgage and Housing Corporation (CMHC) has been Canada's national housing agency for more than 65 years.

Together with other housing stakeholders, we help ensure that the Canadian housing system remains one of the best in the world. We are committed to helping Canadians access a wide choice of quality, environmentally sustainable and affordable housing solutions that will continue to create vibrant and healthy communities and cities across the country.

For more information, visit our website at www.cmhc.ca

You can also reach us by phone at 1-800-668-2642 or by fax at 1-800-245-9274.
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